

Billing & Services provides your clients online access to their invoices, services, tax exemptions, credits, orders and quotes.

Clicking **View Invoice** opens the *View Invoices* page. Based on the selected view criteria, either unpaid, paid or all invoice display. From this page, your clients can view any invoice and pay for a selected invoice online.

On this page:


On this page:

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Clicking **View Services** opens the *View Services* page. Based on the selected view criteria, either current, recurring, one time, or all services display. From this page, your clients can view the details of any service and authorize you to automatically charge them for a service.

## View Tax Exemptions

Clicking **View Tax Exemption** displays the *View Tax Exemption* page. Based on the selected view criteria, either all, active, pending approval, or deactivated tax exemptions display. Your clients can add new and update existing tax exemptions.

 You can control if tax exemptions are editable from the *Settings* page.

The screenshot displays the Ubersmith web application interface. At the top, the navigation bar includes the 'ubersmith' logo, a 'Log Out' button, and user information: '1 user listed', '2 email alerts', and '10 outstanding invoices'. The left sidebar contains a menu with categories like 'Home Profile', 'Billing & Services', 'Domain Management', and 'Support'. The 'Billing & Services' section is expanded, showing 'View My Account' (highlighted with a red circle), 'View Profile', 'View Credit', and 'View Quotes'. The main content area is titled 'View Tax Exemptions: Active' and shows a table with columns: Tax Exemption ID, Status, Certificate ID, PDF, Effective Date, and Expiration Date. The table contains one entry with ID '1', Status 'Active', Certificate ID 'Non-PDFs', and dates from Aug/19/2014 to Aug/19/2017.

## View Credits

Clicking **View Credits** opens the *View Credits* page. Based on the selected view criteria, either current or all credits display. Your clients can view the details of any credit issued to them.

[illegible]

## View Orders

Clicking **View Orders** opens the *View Orders* page. From the *View Orders* page, your clients can select a specific order to view the details of that order and post a follow-up message to you about the order.

[illegible]

## View Quotes

Clicking **View Quotes** opens the *View Quotes* page. From the *View Quotes* page, your clients can select a specific quote to view the details of that quote and sign the contract to begin using the quoted service.

- Cogswell Cogs
- 1 team listed
- 24 outstanding invoices
- 8 active services

[View Quotes](#)

ID	Name	Status	Updated +	MVA	MVA
132	New Service	Open	3 weeks ago	\$ 0.00	\$ 0.00
78	Renewed Service	Pending	1 month ago	\$ 200.00	\$ 0.00
22	Outstanding Service Order	Expired	1 month ago	\$ 200.00	\$ 0.00
40	New Service	Expired	1 month ago	\$ 300.00	\$ 1,040.00
50	Tax Update	Expired	1 month ago	\$ 200.00	\$ 0.00
62	New Service	Expired	1 month ago	\$ 1,120.00	\$ 0.00
83	New Service Challenge	Expired	1 month ago	\$ 440.00	\$ 1,040.00
94	New Service	Expired	1 month ago	\$ 300.00	\$ 0.00
87	New Service	Expired	1 month ago	\$ 300.00	\$ 0.00
89	Renewed Service Challenge	Expired	1 month ago	\$ 1,020.00	\$ 1,040.00

**Quotes 1 of 82 of Cogswell**

## PayPal Subscriptions

Clicking **Create PayPal Subscriptions** opens the *Create PayPal Subscription* page. Your clients can select the period and the services available to be charged a fixed amount for a specific period. Once your client selects their desired period and services, clicking **Create Subscription** opens the PayPal site, where your clients can establish the subscription with PayPal.

The screenshot shows the ubersmith Frog Alley dashboard. The left sidebar contains navigation links: Client Profile, Payment Methods, Client Dashboard, View Contacts, Billing & Services, View Transactions, View Services, View Tax Exemptions, View Orders, View Profile, **Virtual Subscriptions** (highlighted with a red circle), Reports, Client Logs, Client Login Logs, Mail Log, Domain Management, Support, and Service Manager. The main content area is titled 'View Subscriptions: Active' and includes a 'CREATE NEW SUBSCRIPTION' button (highlighted with a red circle). Below this is a table of active subscriptions. A modal titled 'Create Paypal Subscription' is open, showing a table of services with checkboxes for selection. The modal also has a 'Create Subscription' button (highlighted with a red circle) and a 'Cancel' button. Red arrows point to the 'Services' column header and the 'Create Subscription' button in the modal.

Subscription ID	Status	Amount	Frequency	Paypal ID
13	Active	\$ 311.33	Monthly	Matsson (Cancel)

Services	Period	Monthly
<input checked="" type="checkbox"/> 461	Virtual Hosting	\$ 202.43
<input checked="" type="checkbox"/> 462	Virtual Hosting	\$ 10.93
<input checked="" type="checkbox"/> 466	Virtual Hosting	\$ 97.97
<input checked="" type="checkbox"/> 467	Virtual Hosting	\$ 77.90
<input checked="" type="checkbox"/> 469	Virtual Hosting	\$ 46.93
<input checked="" type="checkbox"/> 471	Virtual Hosting	\$ 50.91

## Related Topics

[Client Portal](#)